

**USER'S MANUAL  
FOR THE  
PATS  
BILLING APPLICATION**

**VERSION 3.0**



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## **Introduction:**

The PATS project is designed to collect detail data regarding both the planning and delivery of prevention services/programs in the State of Utah. In addition, PATS serves as a means to help both the local prevention worker and the State Division better manage the preparation for and implementation of substance abuse prevention activities and programs by providing useful and meaningful information about the populations, risk/protective factors, and other community data which they address.

The billing functionality of PATS is designed to give the Local Authority user the means to track, monitor, approve, and ultimately pay the billable services a subcontractor provides for the Local Authority.

## **Section I: Policies and Procedures**

### **[A] Data Submission**

Each Local Authority is required to submit the data regarding the delivery of their prevention services no later than thirty days after the end of each fiscal quarter.

The fiscal quarters are:

Quarter One	July 1 through September 30
Quarter Two	October 1 through December 31
Quarter Three	January 1 through March 31
Quarter Four	April 1 through June 30

The data entry dead line for each quarter is:

Quarter One	October 31
Quarter Two	January 31
Quarter Three	April 30
Quarter Four	July 31

The data entered into PATS is saved and stored on a real time basis. As a result, the moment a piece of information is saved in PATS it can be instantly seen in the system and/or in a report. Since PATS is a “real time” system, the Division of Substance recommends that the user simply go about performing their data entry on a regular daily, weekly, or monthly routine with consideration of the quarterly data entry dead lines. If the data is entered on a reasonable, consistent schedule as described above, then the user and their Local Authority agency need not feel concerned about satisfying the dead line because compliance with it is built into such a schedule by default.

## **[B] Issue Ticket**

In order to serve PATS users with a formal process for documenting problems and questions which arise with use of the software, the Division has created a procedure for addressing such items. Each user who experiences a problem, raises an issue, or has a question regarding the use of PATS must submit an "Issue Ticket" to the Division of Substance Abuse which details what the problem, issue, or question is.

The process for submitting the ticket is described below.

[1] The user must go to the Division's website and navigate to the page which contains the hyperlinks for PATS ( [http://www.hsdsa.utah.gov/DSA\\_Web\\_Links.htm](http://www.hsdsa.utah.gov/DSA_Web_Links.htm) )

[2] After navigating to the Web Page, the user must click on the "PATS Issue Ticket Form" hyperlink.

[3] After the form has loaded, the user must fill in:

- a. The user's name **(required)**
- b. The user's Local Authority agency **(required)**
- c. The user's telephone number **(required)**
- d. The description of the problem or issue **(required)**
- e. If an error occurred, then the error message must be included on the form **(required when an error is involved)**
- f. Add any other pertinent information

[4] When the form is completely filled out, the user must click on the "Submit" button located at the bottom of the form.

[5] After the Issue Ticket has been submitted, the Division will address the ticket with five working days of receiving it.

## **[C] Accessing PATS & Its Reports**

### **Accessing PATS**

PATS should **ONLY** be accessed through the Division's website. The URL for PATS is subject to change by forces outside of the Division's control. Consequently, the Division created a Web Page in its site which contains a hyperlink to PATS ([http://www.hsdas.utah.gov/DSA\\_Web\\_Links.htm](http://www.hsdas.utah.gov/DSA_Web_Links.htm)). The user is welcome to bookmark the Web Page. However, they should **NOT** bookmark the software URL because when it changes the bookmark will not automatically point to the new URL.

The communication between the user's computer and PATS is digitally encrypted in order to protect the communication link from being hacked into from someone outside of State government. Even so, the probability that someone can somehow circumvent the digital security can increase if the communication link is left open indefinitely. Consequently, the PATS software will "Time Out" if it is not used for more than 30 minutes. If the "Time Out" function is engaged, then the software will abort the user's current session. Aborting the session means that the user will have to log into PATS again before they can use the software.

### **PATS Reports**

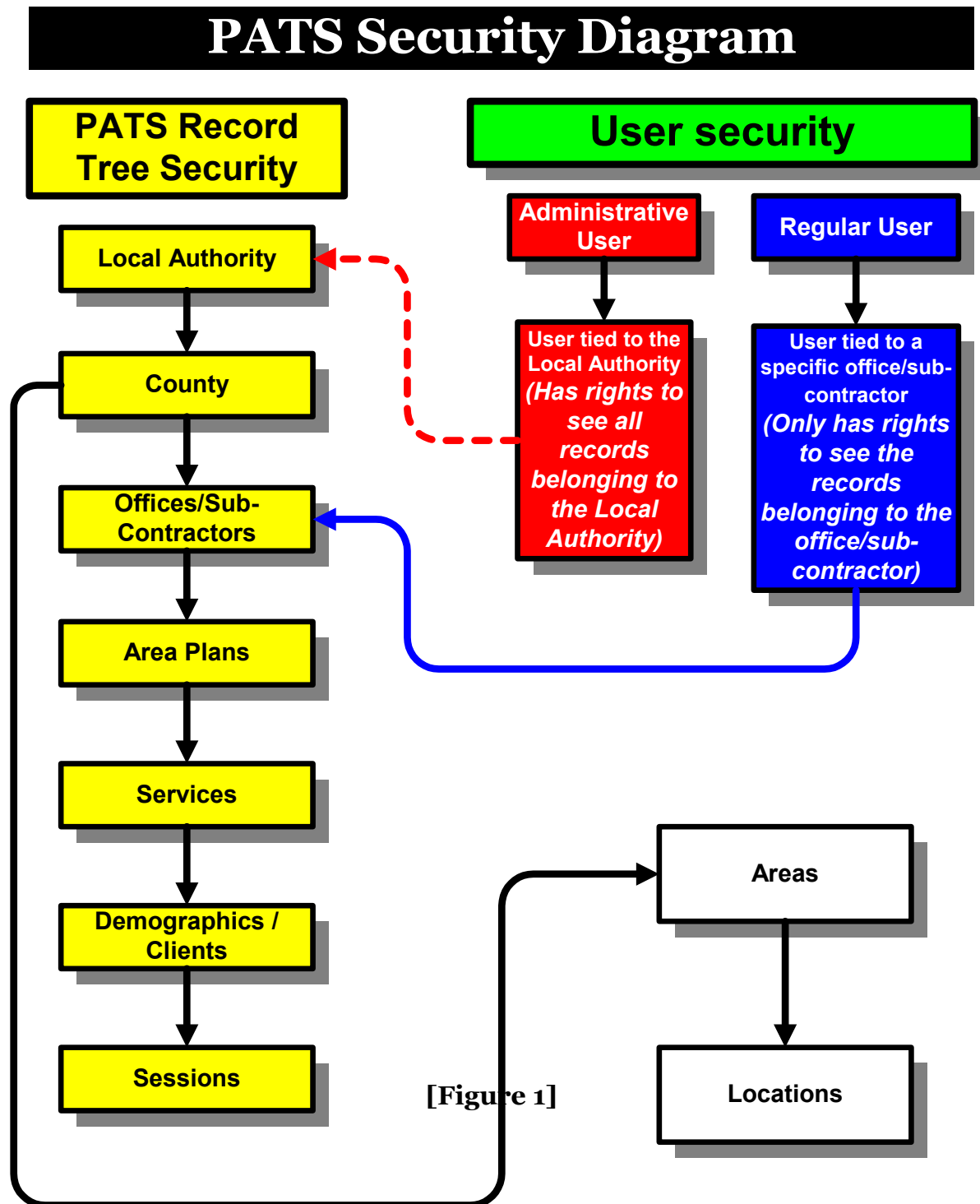
The PATS Reports for a given Local Authority will also be accessible through the same Web Page described above via the "PATS Reports" hyperlink.

## **[D] User Security**

In accordance with The Utah State Department of Human Service's security policy, each time a user adds or modifies a record within PATS, the user's ID will be added to the given record when it is newly saved or updated along with the date the transaction takes place. The practice of recording the User's ID serves the purpose of making each user accountable and responsible for the information they manage, add, modify, etc., in PATS. As a result of the policy, each user of PATS can not, under any circumstances, reveal their user ID and password to any individual other than State staff who work in the Department of Human Services or the Division of Information Technology Services (ITS).

If a user does reveal their ID and password to another individual who then uses it to gain access to PATS illegitimately, then the owner of the ID is responsible and liable for any transactions that are made in the software and its database for good or bad because their ID will be stored in the database along with the affected data.

## Section II: PATS Data Security





## **PATS Security Documentation:**

PATS security is designed with two levels of user access that controls what an individual user can see. One user type is **Administrative**. The other user type is **Regular**. Administrative users can see all of the data that belongs to the Local Authority they are assigned to. The Regular user can only see the data that belongs to the office(s) he/she is assigned to. Hence, depending upon what designation a specific user is given by DSAMH staff (i.e. Administrative or Regular), the user will be restricted in regard to what they can and cannot see.

### **1. Administrative Users**

As Figure 1 depicts, an Administrative user is assigned to a Local Authority. Typically, the Prevention Coordinator is assigned as an Administrative User. The assignment dictates that the Prevention Coordinator can see all of the counties, offices/sub-contractors, Area Plans, Services, Demographics/Clients, and Sessions that are entered in PATS for the specific Local Authority the Coordinator works for.

### **2. Regular Users**

As Figure 1 depicts, a Regular user is assigned to a specific Office/Sub-contractor. Typically, the regular prevention worker is assigned as a Regular User. The assignment dictates that the prevention worker can **only** see the Area Plans, Services, Demographics/Clients, and Sessions that are entered in PATS for the specific Office(s)/Sub-contractor(s) the user is assigned to.

### **3. Areas & Locations**

Areas are generalized regions within a county where prevention services are delivered (i.e. a city, a neighborhood, a school district, etc.). Locations represent specific coordinates where the service is delivered (i.e. the Washington Library, Tintic Elementary School, the Beaver Office, etc.).

Areas are assigned to a county. Locations are assigned to an Area. Consequently, a user can only see the areas and locations which are assigned to the county(ies), and subsequently the office(s)/sub-contractor(s), he/she is attached to. In addition, if two or more offices/sub-contractors exist within the same county, the user(s) assigned to them can see all of the Areas and Locations associated with the county because Offices/Sub-contractors are tied to a county just as Areas/Locations are. However, even though PATS allows a user from one Office to see the locations created for another Office which resides in the same county, it **does not** allow him/her to see the other Office's Area Plans, Services, Demographics/Clients, and Sessions (see Figure 1). Hence, the security described for Regular Users remains intact even though a user can see all of the Locations entered for the county. As a result, Areas and Locations have no bearing on or relevance in determining what Area Plans, Services, etc., a Regular User can see.

## Section III – PATS Data Entry Process

**Service Information** Add New Location

<< < > >> [Save](#) [Undo](#) [Delete](#) [Insert](#) [Maintain Clients](#) [Sessions](#) [Demographics](#) [Return](#) [Cancel](#)

API Service Name <a href="#">Adult DUI Education</a>	Location <a href="#">Deaver Senior High</a>
Other Description <a href="#">Adult DUI Education</a>	Target Pop Name <a href="#">Elementary Age Youth</a>
Community <input checked="" type="checkbox"/>	Comments
Family <input type="checkbox"/>	
Peer <input type="checkbox"/>	
School <input type="checkbox"/>	
IOM Class <a href="#">Indicated Services</a>	Multiple Sessions <input checked="" type="checkbox"/>
Complete <input type="checkbox"/>	Clients <input type="checkbox"/>
Start Date * <a href="#">03/05/2002</a>	Fiscal Quarter <a href="#">3</a>
Units Given	Fiscal Year <a href="#">2002</a>
Planned Hours	

**Risk** **Protective**

Risk Code	Risk Factor
No records found!	

<< < > >> [Delete](#) [Insert](#) From 0 to 1 Total: 0

1

2

**Demographics**

API Service Name <a href="#">Adult DUI Education</a>	0 to 4	<a href="#">0</a>	Males	<a href="#">0</a>	White	<a href="#">0</a>
Other Description <a href="#">Adult DUI Education</a>	5 to 11	<a href="#">0</a>	Females	<a href="#">0</a>	Black	<a href="#">0</a>
Start Date <a href="#">03/05/2002</a>	12 to 14	<a href="#">0</a>	Total Gender 0		Hispanic	<a href="#">0</a>
General Count <a href="#">0</a>	15 to 17	<a href="#">0</a>			Islander/Asian	<a href="#">0</a>
Total Count 0	18 to 20	<a href="#">0</a>			Native American	<a href="#">0</a>
	21 to 24	<a href="#">0</a>			Multiple Race	<a href="#">0</a>
	25 to 44	<a href="#">0</a>			Other	<a href="#">0</a>
	45 to 64	<a href="#">0</a>			Total Race 0	
	65 and Over	<a href="#">0</a>				
	Total Age	0				

[OK](#) [Cancel](#)

3

**Session Maintenance**

<< < > >> [Save](#) [Undo](#) [Delete](#) [Insert](#) [Attendance](#) [Demographics](#) [Clients](#)

Date of Session \* [\[Calendar Icon\]](#)

Total Demographics 0

Attended [\[Text Box\]](#)

Hours [\[Text Box\]](#)

Units [\[Text Box\]](#)

Comments [\[Text Area\]](#)

[Figure 1]

The process for entering data in PATS generally consists of three-steps. They are:

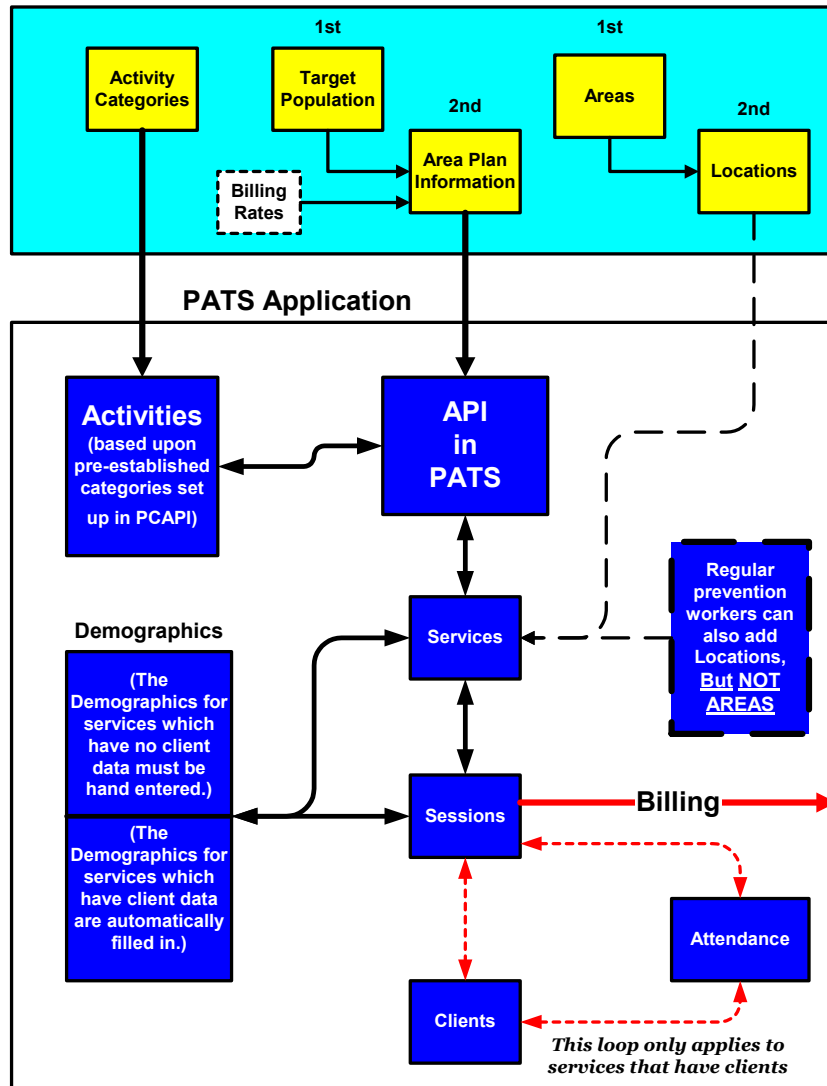
- [1] creating a Service.
- [2] creating general Demographic or Client specific data.
- [3] creating Sessions.

Regardless of the kind of service that is entered into PATS, the user should follow each step.

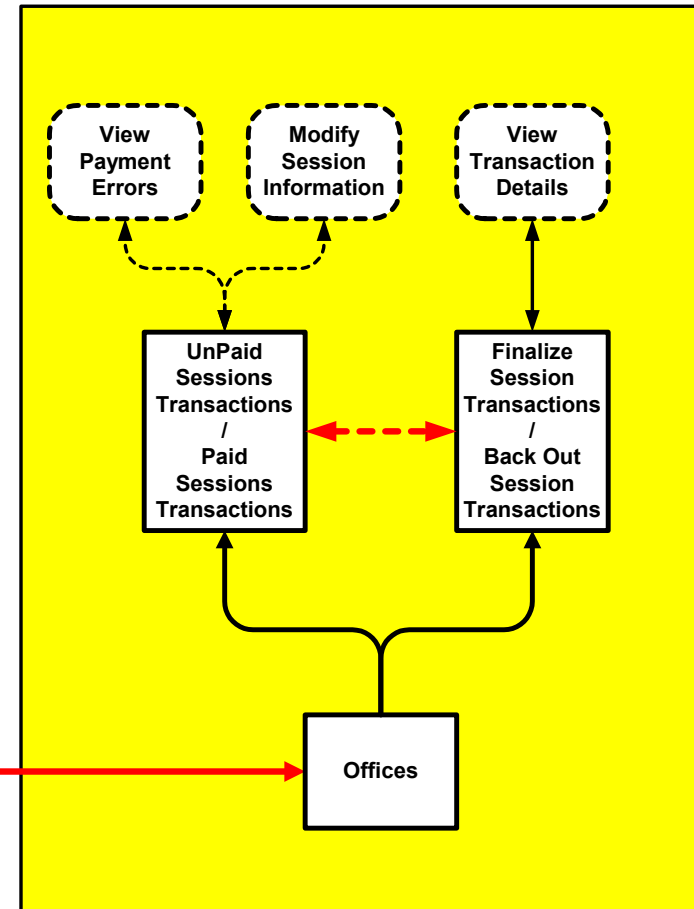
As Section III in this document describes, data flows from the PCAPI application into PATS for the purpose of reducing and simplifying the data entry that a PATS user must do for a given Service. One significant type of data that flows from PCAPI is the designation that the Service will either require Demographic or Client specific data (please see **Section VI: Subsection G** in the *PCAPI User Manual*.) If the Service is marked as requiring demographic data, then Step 2 in Figure 1 above is addressed by simply filling in the demographic data (please see **Section VII – Subsections A or C** in the *PATS User's Manual*). However, if the Service is marked as requiring client specific data, then Step 2 in Figure 1 above is addressed by creating a client roster (please see **Section VII – Subsection B** in the *PATS User's Manual*). In addition, if client data is required, the session attendance will be collected from the “attendance” that is marked for each session from the client roster (please see **Section VII – Subsection B** in the *PATS User's Manual*).

## Section IV: PATS, PCAPI, & PATS Billing Data Flow Diagram

Prevention Coordinator Area Plan Information (PCAPI) Application

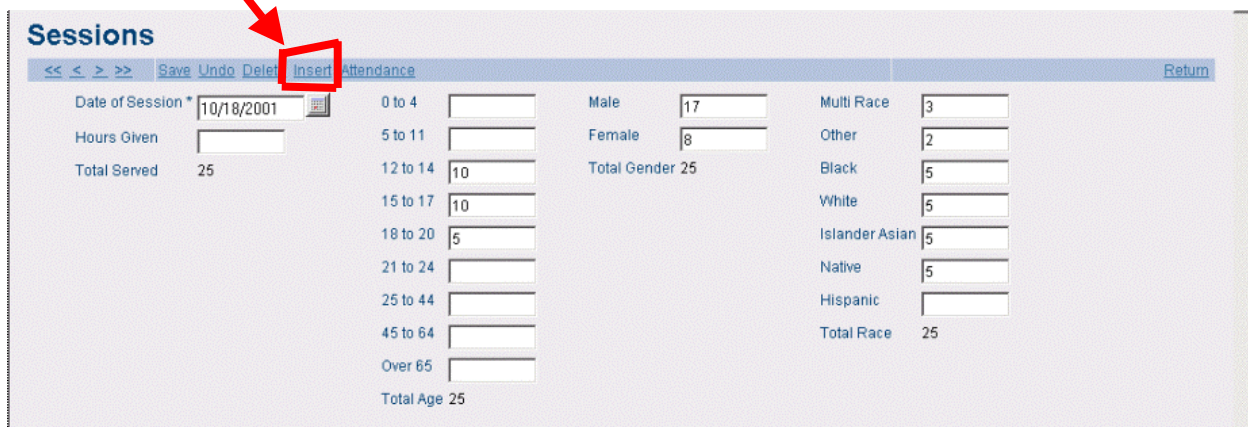


PATS Billing Application



## Section V: Do's And Don'ts

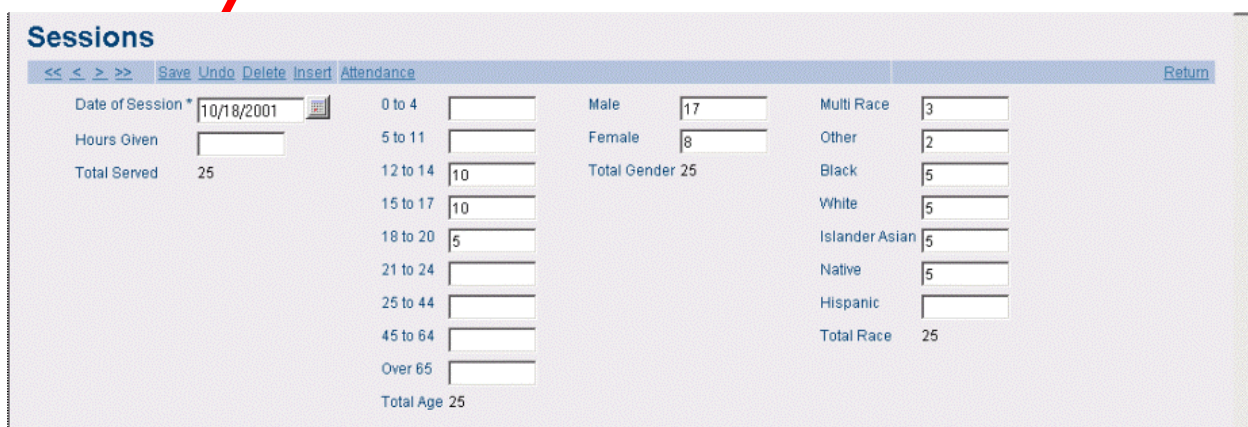
1. Do use the **INSERT** button in order to type data in fields on the screen.



The screenshot shows the 'Sessions' form with the 'INSERT' button highlighted by a red arrow. The form contains the following data:

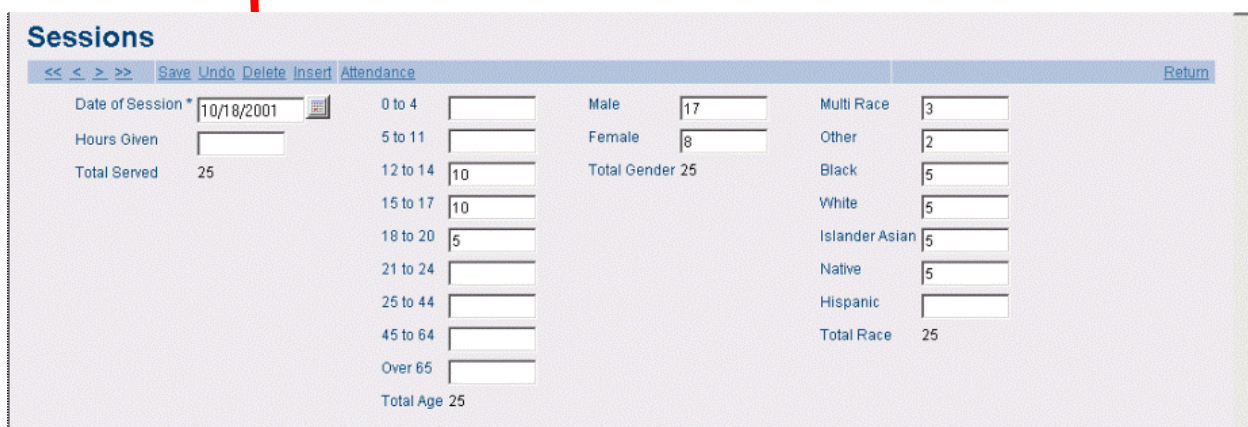
Sessions		Attendance		Return	
Date of Session *	10/18/2001	0 to 4		Male	17
Hours Given		5 to 11		Female	8
Total Served	25	12 to 14	10	Total Gender	25
		15 to 17	10	Multi Race	3
		18 to 20	5	Other	2
		21 to 24		Black	5
		25 to 44		White	5
		45 to 64		Islander Asian	5
		Over 65		Native	5
		Total Age	25	Hispanic	
				Total Race	25

2. Do use the **SAVE** button to save the data entered on the screen.



The screenshot shows the 'Sessions' form with the 'SAVE' button highlighted by a red arrow. The form contains the same data as the previous screenshot.

3. Do use the **DELETE** button to remove data previously saved in the database.



The screenshot shows the 'Sessions' form with the 'DELETE' button highlighted by a red arrow. The form contains the same data as the previous screenshots.

4. Do use the **UNDO** button to erase data from the screen without saving it.



**Sessions**

[Save](#)
[Undo](#)
[Delete](#)
[Insert](#)
[Attendance](#)
[Return](#)

Date of Session \* 
 0 to 4 
 Male 
 Multi Race

Hours Given 
 5 to 11 
 Female 
 Other

Total Served 25
 12 to 14 
 Total Gender 25
 Black

15 to 17 
 White

18 to 20 
 Islander Asian

21 to 24 
 Native

25 to 44 
 Hispanic

45 to 64 
 Total Race 25

Over 65

Total Age 25

5. Do use the **RETURN** Button in order to go back to the previous screen.

**Sessions**

[Save](#)
[Undo](#)
[Delete](#)
[Insert](#)
[Attendance](#)
[Return](#)

Date of Session \* 
 0 to 4 
 Male 
 Multi Race

Hours Given 
 5 to 11 
 Female 
 Other

Total Served 25
 12 to 14 
 Total Gender 25
 Black

15 to 17 
 White

18 to 20 
 Islander Asian

21 to 24 
 Native

25 to 44 
 Hispanic

45 to 64 
 Total Race 25

Over 65

Total Age 25

6. Do Not use the **BACK** button located on your browser to return to a previous screen.

DSA Home - Microsoft Internet Explorer

File Edit View Favorites Tools Help

[Back](#)
[Forward](#)
[Stop](#)
[Home](#)
[Search](#)
[Favorites](#)
[History](#)

Address

utah.gov
 State Online Services
 Agency List
 Search Utah.gov
 go

7. Do use the **Offices** button to travel directly from the Sessions, Clients, or Attendance screens back to the Satellite Offices screen.

**Session Maintenance** [Offices](#)

<< < > >> [Return](#) [Cancel](#)

Service [New API](#) Office [Box Elder Main Office](#) Target Pop [Alcohol and Other Drug Using Adults](#)  
 Other Desc. [Clients](#) Location [Even Newer location](#)

	Date of Session	Number of Sessions	Dup Count	Single Count	Hours Given	Total Served
<input checked="" type="radio"/>	11/22/2001					1
<input type="radio"/>	11/28/2001					0

<< < > >> From 1 to 2 Total: 2 [Maintain Session](#) [Add New Session](#) [Attendance](#)

8. Do use the **Find** button to search for an item based upon the criteria contained in the search fields located on the screen.

**Service Maintenance**

<< < > >>

Office Name [Bever](#) Office Type [Satellite Office](#) Telephone Number

**Services** **Activities**

[Find](#) [Clear](#)

API Service Name

Other Description

Fiscal Year

Fiscal Quarter

	API Service Name	Other Description	IOM Class
<input checked="" type="radio"/>	Adult DUI Education	Adult DUI Education	Indicated Services
<input type="radio"/>	Free The Horses	Free the Horses	Universal Services

<< < > >> From 1 to 2 Total: 2 [Demographics](#) [Maintain Service](#) [Add New Service](#) [Clients](#) [Sessions](#)

## **Section VI: PATS Billing Business Rules**

The following information presents the business rules which govern how the billing process operates.

- In order for an Area Plan Program to use the billing system, it must be marked as **Billable**, have a **Payment Process** selected and have a **Contract Amount** entered.
- There are 3 levels of control for the billing system.
  - 1.** API: By setting the Payment Process on the API.
  - 2.** Service: By setting the Payment Process on the Service.
  - 3.** Session: By marking a Session as non-billable or mark it as unapproved.
- If a change is made to any of the following that affects billing, the system will back out (credit or delete the transaction if not finalized) any affected transactions and mark the Session as unpaid.
  - 1.** Area Plan Program
  - 2.** Rates
  - 3.** Session – This will cause a history record to be written.
- All Credits are final. All the credits will be written out as finalized.
- When a credit is made, it will use the Run Month and Run Year equal to one month after the last time the API was paid. This means that normally if a Session creates a credit it will use next month as the Run Month.
- If there are any problems getting the rates needed for the transactions, an error record will be written. Error messages stay with a Session even after the problem has been corrected and the Session has been paid.



## **Section VII: How To Use PATS Billing At A Glance**

PATS Billing is designed to help the local Prevention Coordinator approve, pay, and finalize billable transactions for prevention services delivered by a sub-contractor.

The process of approving, paying, and finalizing transactions is displayed below.

Sub-Section A: Review and/or Disapprove specific Session Transactions

Sub-Section B: Pay approved Program/Session Transactions

Sub-Section C: View Paid Program/Sessions

Sub-Section D: Back Out Paid Program/Session Transactions

Sub-Section E: Finalize Paid Program/Session Transactions

The Instructions for Section V are designed to give the User a brief review of the steps and procedures required to complete each task depicted by its respective Sub-Section.

## Sub-Section A: Review and/or Disapprove specific Session Transactions

Before the User should pay program/session transactions, they should review the data entered for a specific office for the desired billing period. Sub-Section A reviews how the User can review the billable Session data prior to paying it.

### Billing Application

[Find](#) [Clear](#)

Office Name

<u>Office Name</u>	<u>Office Type</u>	<u>Telephone Number</u>
<input checked="" type="radio"/> Alpine School District	Satellite Office	
<input type="radio"/> Box Elder Main Office	Main Office	8011234569
<input type="radio"/> Box Elder Satellite Office	Satellite Office	8011234570
<input type="radio"/> Cache Main Office	Main Office	8011234571
<input type="radio"/> Cache Satellite Office	Satellite Office	8011234572
<input type="radio"/> Carbon Main Office	Main Office	8011234573
<input type="radio"/> Carbon Satellite Office	Satellite Office	8011234574
<input type="radio"/> Davis Main Office	Main Office	8011234577
<input type="radio"/> Davis Satellite Office	Satellite Office	8011234578
<input type="radio"/> Emery Main Office	Main Office	8011234581
<< < > >> From 1 to 10 Total: 10+ <a href="#">Sessions</a> <a href="#">Transactions</a>		

1.  
Select the **Sub-Contractor's Office Name** which delivered the service/ program.

2.  
Click on the **Sessions** button.

**Unpaid** **Paid**

These Sessions have not been paid.

[Find](#) [Clear](#)

API Service Name

Service Short Name

Fiscal Year

Fiscal Quarter

Date of Session

API Service Name	Service Short Name
<input checked="" type="radio"/> Anger Management Program	Anger Management
<input type="radio"/> Anger Management Program	Anger Management
<input type="radio"/> Anger Management Program	Anger Management
<input type="radio"/> Anger Management Program	Anger Management

<< < > >> From 1 to 4 Total 4 [Details](#) [Transactions](#) [Errors](#)

**Red** text indicates an Error  
**Blue** text indicates Not Approved or Not Billable

3.

If applicable, search for the desired program/session by typing the desired search criteria and clicking on the **Find** button.

4.

When the desired program/session appears, click on the **Radio** button next to its name.

5.

Then click on the **Details** button.

## Session Maintenance

<< < > >> **Save** Undo Delete Transactions Errors

Office Name Salt Lake Main Office

API Service Name Birth to Three

Service Short Name Birth to Three

Date of Session \* 08/02/2002

Total Count 40

Attended 40

Hours 2.0

Units

Comments

Billable \* ☒

Approved ☒

Paid Yes

Changed Date 08/05/2002

Changed By rbirrell

Added Date 08/05/2002

Added By genichol

6.

Make any desired changes (i.e. check/uncheck the **Billable check box**, change the # of **hours**, etc.).

5.

Then click on the **Save** button.

## Sub-Section B: Pay Approved Session Transactions

After the User is confident that all of the Session information is reasonable and correct, they can pay the sessions. The following instructions show how to pay sessions.

### Billing Application

[Find](#) [Clear](#)

Office Name

Office Name	Office Type	Telephone Number
<input checked="" type="radio"/> Alpine School District	Satellite Office	
<input type="radio"/> Box Elder Main Office	Main Office	8011234569
<input type="radio"/> Box Elder Satellite Office	Satellite Office	8011234570
<input type="radio"/> Cache Main Office	Main Office	8011234571
<input type="radio"/> Cache Satellite Office	Satellite Office	8011234572
<input type="radio"/> Carbon Main Office	Main Office	8011234573
<input type="radio"/> Carbon Satellite Office	Satellite Office	8011234574
<input type="radio"/> Davis Main Office	Main Office	8011234577
<input type="radio"/> Davis Satellite Office	Satellite Office	8011234578
<input type="radio"/> Emery Main Office	Main Office	8011234581

<< < > >> From 1 to 10 Total: 10+ [Sessions Transactions](#)

1. Select the Office that needs to have its Session Paid.
2. Click the **Sessions** button.

**3.**  
Click the **Pay Sessions**  
button.

Unpaid

Paid

These Sessions have not been paid.

Find

Clear

API Service Name

Service Short Name

Fiscal Year

Fiscal Quarter

Date of Session

API Service Name	Service Short Name	Service Counter	Fiscal Year	Fiscal Quarter	Date of Session
<input checked="" type="radio"/> Anger Management Program	Anger Management	255	2003	1	08/01/2002
<input type="radio"/> Anger Management Program	Anger Management	255	2003	1	08/07/2002
<input type="radio"/> Anger Management Program	Anger Management	259	2003	1	08/06/2002
<input type="radio"/> Anger Management Program	Anger Management	259	2003	1	08/07/2002

<<

<

>

>>

From 1 to 4 Total: 4

[Details](#)
[Transactions](#)
[Errors](#)

Red text indicates an Error  
Blue text indicates Not Approved or Not Billable

**Note:** Be sure that the list of Programs/Sessions on the screen contains all of the programs/sessions that are eligible for payment.

## Sub-Section C: View Paid Programs/Sessions

### Billing Application

[Find](#) [Clear](#)

Office Name

Office Name	Office Type	
<input checked="" type="radio"/> Alpine School District	Satellite Office	
<input type="radio"/> Box Elder Main Office	Main Office	8011234569
<input type="radio"/> Box Elder Satellite Office	Satellite Office	8011234570
<input type="radio"/> Cache Main Office	Main Office	8011234571
<input type="radio"/> Cache Satellite Office	Satellite Office	8011234572
<input type="radio"/> Carbon Main Office	Main Office	8011234573
<input type="radio"/> Carbon Satellite Office	Satellite Office	8011234574
<input type="radio"/> Davis Main Office	Main Office	8011234577
<input type="radio"/> Davis Satellite Office	Satellite Office	8011234578
<input type="radio"/> Emery Main Office	Main Office	8011234581
<< < > >> From 1 to 10 Total: 10+ <a href="#">Sessions</a> <a href="#">Transactions</a>		

1. Select the Office that has Paid Sessions.
2. Click the **Sessions** button.

**3.**  
Click on the **Paid Tab** to  
view the Programs/Sessions  
that have been paid.

Unpaid **Paid**

These Sessions have been paid.

[Find](#) [Clear](#)

API Service Name

Service Short Name

Fiscal Year

Fiscal Quarter

Date of Session

<u>API Service Name</u>	<u>Service Short Name</u>	<u>Service Counter</u>	<u>Fiscal Year</u>	<u>Fiscal Quarter</u>	<u>Date of Session</u>	<u>Total Count</u>
<input checked="" type="radio"/> Birth to Three	Birth to Three	258	2003	1	08/02/2002	40
<input type="radio"/> DUI Program	DUI	256	2003	1	08/01/2002	4
<input type="radio"/> Families in Action	Families in Action	257	2003	1	08/05/2002	3

From 1 to 3 Total: 3 [Details](#) [Transactions](#) [Errors](#)



## Sub-Section D: Back Out Paid Programs/Session Transactions

### Billing Application

[Find](#) [Clear](#)

Office Name

Office Name	Office Type	
<input checked="" type="radio"/> Alpine School District	Satellite Office	
<input type="radio"/> Box Elder Main Office	Main Office	8011234569
<input type="radio"/> Box Elder Satellite Office	Satellite Office	8011234570
<input type="radio"/> Cache Main Office	Main Office	8011234571
<input type="radio"/> Cache Satellite Office	Satellite Office	8011234572
<input type="radio"/> Carbon Main Office	Main Office	8011234573
<input type="radio"/> Carbon Satellite Office	Satellite Office	8011234574
<input type="radio"/> Davis Main Office	Main Office	8011234577
<input type="radio"/> Davis Satellite Office	Satellite Office	8011234578
<input type="radio"/> Emery Main Office	Main Office	8011234581
<< < > >> From 1 to 10 Total: 10+ <a href="#">Sessions</a> <a href="#">Transactions</a>		

1.  
Select the Office that has  
Paid Sessions.

2.  
Click the **Transactions**  
button.

**3.**  
Click on the **Back Out Transactions** button.

[Find](#) [Clear](#)

API Service Name

Date of Session

Run Year

Run Month

Covered Year

Covered Month

Fiscal Year

Finalized Flag

Credit Flag

API Service Name	Date of Session	Run Year	Run Month	Covered Year	Covered Month	Fiscal Year	Billed Amount	Paid Amount	Transaction Units
<input checked="" type="radio"/> Birth to Three	08/02/2002	2002	8	2002	8	2003	\$0.00	\$0.00	0.0
<input type="radio"/> Families in Action	08/05/2002	2002	8	2002	8	2003	\$98.25	\$98.25	3.0
<input type="radio"/> DUI Program	08/01/2002	2002	8	2002	8	2003	\$18.00	\$18.00	4.0

<< < > >> From 1 to 3 Total: 3 [Details](#)

Grey background indicates an Unfinalized transaction  
 Red text indicates a Credit Transaction

## Sub-Section E: Finalize Paid Programs/Session Transactions

### Billing Application

[Find](#) [Clear](#)

Office Name

Office Name	Office Type	
<input checked="" type="radio"/> Alpine School District	Satellite Office	
<input type="radio"/> Box Elder Main Office	Main Office	8011234569
<input type="radio"/> Box Elder Satellite Office	Satellite Office	8011234570
<input type="radio"/> Cache Main Office	Main Office	8011234571
<input type="radio"/> Cache Satellite Office	Satellite Office	8011234572
<input type="radio"/> Carbon Main Office	Main Office	8011234573
<input type="radio"/> Carbon Satellite Office	Satellite Office	8011234574
<input type="radio"/> Davis Main Office	Main Office	8011234577
<input type="radio"/> Davis Satellite Office	Satellite Office	8011234578
<input type="radio"/> Emery Main Office	Main Office	8011234581
<< < > >> From 1 to 10 Total: 10+ <a href="#">Sessions</a> <a href="#">Transactions</a>		

1.  
Select the Office that has  
Paid Sessions.

2.  
Click the **Transactions**  
button.

**3.**  
Click on the **Finalize Transactions** button.

[Find](#) [Clear](#)

API Service Name

Date of Session

Run Year

Run Month

Covered Year

Covered Month

Fiscal Year

Finalized Flag ☐

Credit Flag ☐

API Service Name	Date of Session	Run Year	Run Month	Covered Year	Covered Month	Fiscal Year	Billed Amount	Paid Amount	Transaction Units
<input checked="" type="radio"/> Birth to Three	08/02/2002	2002	8	2002	8	2003	\$0.00	\$0.00	0.0
<input type="radio"/> Families in Action	08/05/2002	2002	8	2002	8	2003	\$98.25	\$98.25	3.0
<input type="radio"/> DUI Program	08/01/2002	2002	8	2002	8	2003	\$18.00	\$18.00	4.0

<< < > >> From 1 to 3 Total: 3 [Details](#)

Grey background indicates an Unfinalized transaction  
 Red text indicates a Credit Transaction